



# Big Sky Economic Development Trust Fund (BSTF)

How to Apply for a  
Category II: Planning Grant



# Goal

- To help you determine whether a project would be a good fit for BSTF funding
- To provide tips & tools to fill out a complete BSTF application

# Is this project a good fit for a BSTF planning grant?

- End result – Job Creation Project?

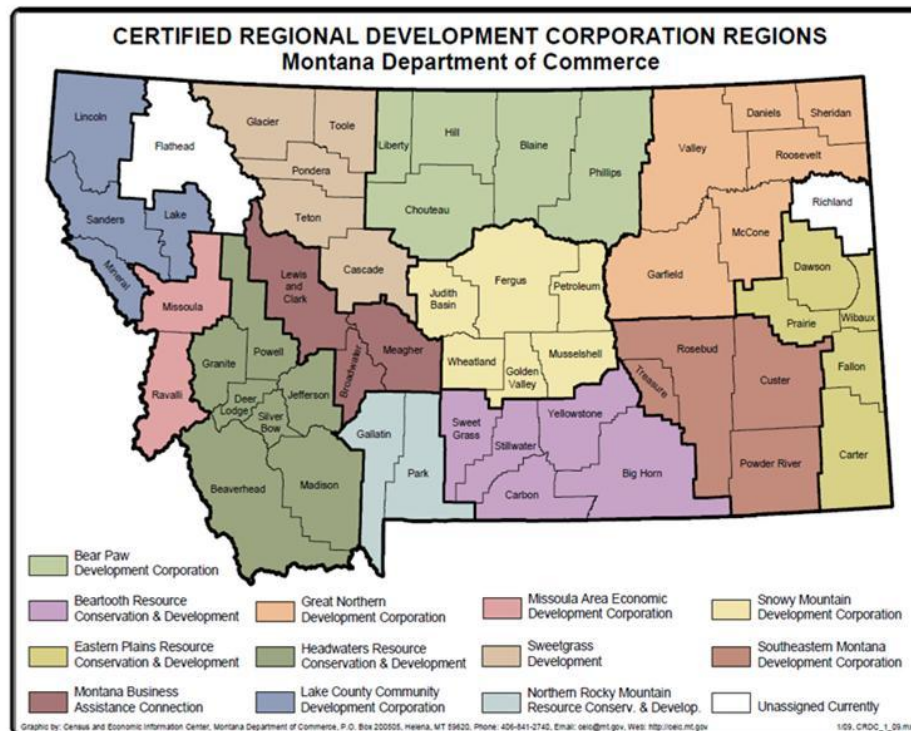
Example: Road PER - > Mine development  
& 200 new jobs



# Who is eligible to apply?

## Where is the project located?

- Certified Regional Development Corporations (CRDC)



## Eligible Applicants Continued

### ■ Tribal Governments



## Eligible Applicants Continued

- Other Local Economic Development Organizations located in a County not part of a CRDC region and meet program eligibility requirements  
(ex. Flathead or Richland County)

# 3 Things to Do Before You Fill Out an Application

- Develop the Scope of Work
- Develop the Cost Estimate
- Identify Sources of Matching Funds

# Developing the Scope of Work

- What is the final deliverable?

- Multi-phase projects – Ex: Feasibility study & business plan

- Consult with qualified consultants

- Consider potential funding sources for future project phases?

- Preliminary Architectural Report (PAR) Outline – Appendix G
  - Uniform Preliminary Engineering Report (PER) Outline:  
<http://dnrc.mt.gov/cardd/ResDevBureau/uniform.asp>



# Developing the Cost Estimate

- Who is doing the work?

If someone other than the eligible applicant (CRDC, Tribal Government, etc.) is completing the work, the following items will be required:

- Consultant Selection Summary
- Consultant Qualifications
- Copy of Proposal/Quote from Consultant

# Identify Sources of Matching Funds

- Recommended match is 50-100%
  - Due to competitive nature of grants – 100% or \$1 for \$1 tends to be more competitive
  - In general, the program only pays for ½ the cost of a study
  - Potential sources:
    - Private match from business entities
    - Federal (EDA, USDA, etc)
    - State programs (ex. Growth Through Agriculture)

# Filling Out the Application

- The application forms may be found on the BSTF Website:

[http://www.businessresources.mt.gov/BRD\\_Trustfund.asp](http://www.businessresources.mt.gov/BRD_Trustfund.asp)

(Note: the website address will soon be changing to  
<http://www.businessresources.mt.gov/bstf.mcpx>)

Big Sky Trust Fund (BSTF) - MDOC - Business Resources Division - Windows Internet Explorer

http://www.businessresources.mt.gov/BRD\_Trustfund.asp

File Edit View Favorites Tools Help

Big Sky Trust Fund (BSTF) - MDOC - Business Resourc...

mt.gov  
Montana's Official State Website

DEPARTMENT OF COMMERCE

Commerce Home Business Community Housing Tourism Finance Census Calendar Search

**Programs/Boards**

- Census & Economic Information Center
- MT Board of Research & Commercialization Technology
- State Tribal Economic Development Commission

**Regional Development Bureau**

- Big Sky Economic Development Trust Fund (BSTF)
  - Business Expansion and Retention (BEAR)
  - Business Finance
  - Certified Regional Development Corporations Program
  - Community Development Block Grant Program (ED)
  - Finance Information Center
  - Indian Country Economic Development Program (ICED)
  - MicroBusiness Finance Program
  - Montana Distressed Wood Products Industry Recovery and Stabilization (WPIRS) Program
  - Workforce Training Grant Programs

**Small Business Development Center Bureau**

- Montana Main Street

**Big Sky Economic Development Trust Fund (BSTF)**

**GRANTS FOR JOB CREATION AND PLANNING PROJECTS**

[2010 BSTF Guidelines](#) | [High Poverty County Map](#) | [Wage Rates](#)

**Planning Grant Webinar Thursday, June 24, 2010**  
Time: 1:30 PM - 3:00 PM MDT  
**Register Now:**  
<https://www1.gotomeeting.com/register/465353401>

**Program Summary**

The Big Sky Economic Development Trust Fund (BSTF) program is a state-funded program created by the 2005 Legislature. It is designed to aid in the development of good paying jobs for Montana residents and promote long-term stable economic growth in Montana. The BSTF program is designed to provide financial assistance in the following two categories:

**Category I: Economic Development Job Creation Projects** 75% of BSTF earnings shall be awarded to local and tribal governments in the form of grants to assist businesses in creating net new eligible jobs that pay the **average county wage**, excluding benefits. **Applications will be accepted on an open-cycle basis** until all available funds are committed to approved projects.

**Category II: Planning Grants** 25% of BSTF earnings shall be awarded to Certified Regional Development Corporations (CRDC), tribal governments and other qualified economic development organizations in areas not covered by a CRDC, in the form of a grant for planning activities such as **business plans, feasibility studies, preliminary architectural reports (PARs), and preliminary engineering reports (PERs)**. Applications will be accepted throughout the year on a quarterly basis.

**Documents & Links**

2010 BSTF Application Guidelines [PDF](#)

**Appendices: (Forms)**  
**Category I:**

- A Job Creation Application
- B Subrecipient Agreement
- C Management Plan
- D Assistance Agreement
- E Confidentiality and Non-Disclosure Agreement
- F Sources and Uses of Funds
- G Credit Check Release
- H Budget Form
- I-1 Job Creation Report Excel
- I-2 Job Creation Report - For Training Grants Only Excel
- J Job Creation Certification
- K Request for Payment Form

**Category II:**

- A Planning Grant Application
- B Budget Form
- C Subrecipient Agreement
- D Management Plan
- E Request for Payment Form
- F Professional Services Contract
- G Preliminary Architectural Report Outline

Select Project Summary

2010 Go!

# Appendix A: Application Form

**APPENDIX A: APPLICATION FORM – PLANNING GRANTS**

**MONTANA DEPARTMENT OF COMMERCE  
BIG SKY ECONOMIC DEVELOPMENT TRUST FUND (BSTF)  
CATEGORY II: PLANNING GRANTS**

**This appendix should be the first item to appear in the application.**  
*Please reference the Application Guidelines for a complete explanation of required application information. Requirements: Submit 2 original copies (3-hole punched, including reference tabs and a table of contents, not spiral bound or double-sided) and 1 electronic copy of the application sent via CD or email.*

<b>I. APPLICANT INFORMATION - CRDC/EDO/TRIBAL GOVERNMENT</b>	
Name of Eligible Applicant	
Federal Tax ID Number	
Authorized Contract Signature (Full Name & Title)	
Day Contact Person (Name & Title)	
Address (Street, City and 9-Digit Zip Code)	
County	
Phone Number	
Email Address	
Fax Number	

<b>II. PROJECT SUMMARY INFORMATION</b>	
Name of Project	
Proposed Use of BSTF Funds: Eligible Activities Listed in Section II. C of Application Guidelines	
Project Location	
Total Project Cost	
Amount of BSTF Funds Requested	
Total Matching Funds	
Name of Assisted Business (If Applicable)	
Total Number of New Jobs to be Created (If Applicable)	
Senate and House Districts	

**III. PARTNER ORGANIZATION(S) / SUB-RECIPIENTS (IF APPLICABLE)**

*Local economic development organizations may be involved in implementing and administering a project through a sub-recipient agreement, if the eligible applicant agrees to such an arrangement. If a sub-recipient organization is involved in the project, applicant must submit a draft sub-recipient agreement with the application. See Appendix C for a sample.*

Contact Person (Full Name & Title)	
Organization	
Address (Street, City and 9-Digit Zip Code)	
Phone Number	
Email Address	

Big Sky Economic Development Trust Fund Program  
Montana Department of Commerce

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2010 Category II – Planning Grants  
Appendix A

Complete  
Full Address,  
City, ST &  
Zip

Proposed Use  
of BSTF  
Funds:  
Pick one title /  
term and use  
throughout the  
application

# Appendix A: Pg 2

Contact Person (Full Name & Title)	
Organization	
Address (Street, City and 9-Digit Zip Code)	
Phone Number	
Email Address	

## IV. BRIEF PROJECT SUMMARY

- Please provide a brief summary of this proposal which describes the nature of the proposed activity, the nature of the assisted business (if applicable) and what the BSTF financial assistance would be used for.
- Specify if outside professional services will be procured.
- Provide any relevant historical information on this project or the region it would support.

## V. PROJECT OBJECTIVES & DELIVERABLES

Please describe, in detail, the objectives of the project. Include a bulleted list detailing what will be delivered to the Department demonstrating objectives were met at the end of the project.

## VI. PROJECT ECONOMIC IMPACT STATEMENT

Please provide a summary of the impact the project would have on the state, regional and community economy.

Please describe any negative impact of the project on the local, regional and/or state economy.

## VII. PROJECT SOURCES & USES OF FUNDS

	SOURCE: BSTF	SOURCE: Match	SOURCE:	TOTAL
Grant Administration				
Professional Services				
Other:				
TOTAL PLANNING PROJECT	\$	\$	\$	\$

List cash and in-kind contributions separately.

Brief Project  
Summary

# Filling out the Application (continued)

## ■ Brief Project Summary

- ☐ Should be brief, less than 1 page
- ☐ Should describe the nature of the request in the first 2 sentences, including who is applying, for how much, what activity and why.
- ☐ Summary should go on to explain what the economic impact of the project is and the projected job creation information.

# Example – A good first sentence

Snowy Mountain Development Corporation, in conjunction with the City of Lewistown is requesting \$26,250 to complete a feasibility study for the Acme Corporation to expand their business into anvil manufacturing.

Who

How much

What

Why



Contact Person (Full Name & Title)	
Organization	
Address (Street, City and 9-Digit Zip Code)	
Phone Number	
Email Address	

#### IV. BRIEF PROJECT SUMMARY

- Please provide a brief summary of this proposal which describes the nature of the proposed activity, the nature of the assisted business (if applicable) and what the BSTF financial assistance would be used for.
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#### VII. PROJECT SOURCES & USES OF FUNDS

	SOURCE: BSTF	SOURCE: Match	SOURCE:	TOTAL
Grant Administration				
Professional Services				
Other:				
TOTAL PLANNING PROJECT	\$	\$	\$	\$

List cash and in-kind contributions separately.

# Define the Final Deliverable

- Insert the proposed scope of work that you developed here. If it is extensive, provide an abbreviated bulleted list of the major areas to be covered and include the full scope of work as an attachment to the document.

Contact Person (Full Name & Title)	
Organization	
Address (Street, City and 9-Digit Zip Code)	
Phone Number	
Email Address	

#### IV. BRIEF PROJECT SUMMARY

- Please provide a brief summary of this proposal which describes the nature of the proposed activity, the nature of the assisted business (if applicable) and what the BSTF financial assistance would be used for.
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Please provide a summary of the impact the project would have on the state, regional and community economy.

Please describe any negative impact of the project on the local, regional and/or state economy.

#### VII. PROJECT SOURCES & USES OF FUNDS

	SOURCE: BSTF	SOURCE: Match	SOURCE:	TOTAL
Grant Administration				
Professional Services				
Other:				
TOTAL PLANNING PROJECT	\$	\$	\$	\$

List cash and in-kind contributions separately.

# Sources & Uses of Funds

## Example 1

- Requesting \$20,000 for a feasibility study
- 5% grant admin

	Source: BSTF	Source: Match Acme Co.	Source:	TOTAL
Grant Administration	\$ 1,000			\$1,000
Professional Services	\$20,000	\$20,000		\$40,000
Other:				
<b>TOTAL PLANNING PROJECT</b>	<b>\$21,000</b>	<b>\$20,000</b>		<b>\$41,000</b>

# Sources & Uses of Funds

## Example 2

	SOURCE: BSTF	SOURCE: Match – USDA - RBOG	Source: In-kind*	TOTAL
Grant Administration	\$1,250		\$1,000 *	\$2,250
Professional Services	\$25,000	\$25,000	\$5,000 *	\$55,000
Other:				
<b>TOTAL PLANNING PROJECT</b>	<b>\$26,250</b>	<b>\$25,000</b>	<b>\$6,000 *</b>	<b>\$57,250</b>

\* Please note that cash match is considered the most competitive. However, in-kind match can help demonstrate commitment and participation in the project.

# Table of Contents

VIII. TABLE OF CONTENTS	
<i>Please attach the following information to your application. See Section IV of the Guidelines.</i>	
	Page/Tab Number
1. Project Description	___
2. Course of Action	___
3. Project Timeline	___
4. Project Budget Form <i>Please fill out the attached form found in Appendix B</i>	___
5. Community Support <i>Please attach letters of support from organizations or other businesses in the community</i>	___
6. Draft Sub-recipient Agreement (if applicable) <i>Sample Form can be found in Appendix C</i>	___
7. Draft Management Plan <i>Sample Form can be found in Appendix D</i>	___
8. Workers' Compensation or Exemption CRDC/EDO/Tribal Government	___
Supporting Documentation: <i>Attach and Reference all additional supporting documentation.</i>	
9. (Description)	___
10. (Description)	___
11. (Description)	___
<b>TRIBAL GOVERNMENT APPLICATIONS:</b>	
12. Tribal Government Resolution	___

Big Sky Economic Development Trust Fund Program  
Montana Department of Commerce

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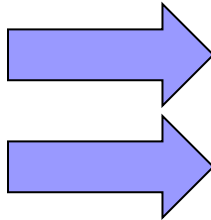
2010 Category II – Planning Grants  
Appendix A

## Tips:

- Do not alter this form
- Use as a checklist
- List N/A if there are items that do not apply to proposed project

# Signature /Certifications

Don't forget  
to fill these  
two fields in.



IX. CERTIFICATION BY CRTC, ELIGIBLE EDO, or TRIBAL GOVERNMENT

As the responsible authorized agent of \_\_\_\_\_ I hereby submit this Big Sky Economic Development Trust Fund Application.

The information presented in this application is, to the best of my knowledge, true, complete and accurately represents the proposed project. I understand that additional information and documentation may be required.

\_\_\_\_\_ will accept responsibility for management of the project and compliance with Big Sky Economic Development Trust Fund regulations.

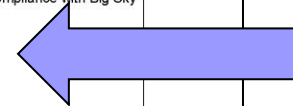
Name (typed): \_\_\_\_\_

Title (typed): \_\_\_\_\_

Authorized Representative

Signature: \_\_\_\_\_ X \_\_\_\_\_

Date: \_\_\_\_\_



Type in name & title of  
authorized person

# Budget Form – Appendix B

- How much are you asking for? Detail this amount only on the Budget Form.

APPENDIX A: APPLICATION FORM – PLANNING GRANTS

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Daily Contact Person (Name & Title)	
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County	
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Email Address	
Fax Number	

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Total Project Cost	
Amount of BSTF Funds Requested	
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Total Number of New Jobs to be Created (If Applicable)	
Senate and House Districts	

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Contact Person (Full Name & Title)	
Organization	
Address (Street, City and 9-Digit Zip Code)	
Phone Number	
Email Address	

Big Sky Economic Development Trust Fund Program  
Montana Department of Commerce

2010 Category II – Planning Grants  
Appendix A

APPENDIX B: BUDGET FORM

MONTANA DEPARTMENT OF COMMERCE  
BIG SKY ECONOMIC DEVELOPMENT TRUST FUND (BSTF)

DETAIL: USE OF BSTF PROPOSED FUNDS ONLY ON THIS FORM, NOT TOTAL PROJECT COST

**SECTION I: APPLICANT INFORMATION**

Contract #	TAX ID#	DATE
MT-BSTF- - - -		
NAME AND FULL ADDRESS OF APPLICANT	ELECTRONIC PAYMENT INFORMATION	
	FINANCIAL INSTITUTION:	
	ROUTING NUMBER:	
	ACCOUNT NUMBER:	

**SECTION II: FINANCIAL INFORMATION**

Budget Line Item	Proposed Project Budget	Approved Budget
1. Professional Services (BSTF Funds Requested towards the development of the Final Deliverable Report)		
2. Administrative Expenses		
3. Other (please specify)		
4. TOTAL GRANT BUDGET		

**SECTION III: APPLICANT CERTIFICATION**

CERTIFICATION OF AUTHORIZED REPRESENTATIVE: I certify that the above information and any attachments thereto are complete and accurate to the best of my knowledge and belief, and that all fiscal obligations detailed above are solely for the purposes set forth in the proposed project.

X

**SECTION IV: DEPARTMENT OF COMMERCE CERTIFICATION**

SIGNATURE	NAME AND TITLE	DATE
Expenditures are reasonable & match cost estimates	Approved by:	
Financial numbers & signatures are correct	Title:	
Administration does not exceed allowable amount	Date:	

Big Sky Economic Development Trust Fund Program  
Montana Department of Commerce

2010 Category II – Planning Grants  
Appendix A



# Budget Form continued

## APPENDIX B: BUDGET FORM

### MONTANA DEPARTMENT OF COMMERCE BIG SKY ECONOMIC DEVELOPMENT TRUST FUND (BSTF)

**DETAIL USE OF BSTF PROPOSED FUNDS ONLY ON THIS FORM, NOT TOTAL PROJECT COST**

SECTION I - APPLICANT INFORMATION		
Contract # MT-BSTF-     -     -	TAX ID#	DATE
NAME AND FULL ADDRESS OF APPLICANT	ELECTRONIC PAYMENT INFORMATION FINANCIAL INSTITUTION: ROUTING NUMBER: ACCOUNT NUMBER:	
SECTION II: FINANCIAL INFORMATION		
Budget Line Item	Proposed Project Budget	Approved Budget
1. Professional Services <b>(BSTF Funds Requested towards the development of the Final Deliverable Report)</b>		
2. Administrative Expenses		
3. Other (please specify)		
4. TOTAL GRANT BUDGET		
REMARKS		
SECTION III: APPLICANT CERTIFICATION		
CERTIFICATION OF AUTHORIZED REPRESENTATIVE: I certify that the above information and any attachments thereto are complete and accurate to the best of my knowledge and belief, and that all fiscal obligations detailed above are solely for the purposes set forth in the proposed project.		
X		
SIGNATURE	NAME AND TITLE	DATE
SECTION IV: DEPARTMENT OF COMMERCE CERTIFICATION		
Expenditures are reasonable & match cost estimates _____	Approved by:	
Financial numbers & signatures are correct _____	Title:	
Administration does not exceed allowable amount _____	Date:	

Enter info for  
applicant, not  
business name  
or sub-recipient

Grant admin  
requested

Enter  
Consultant  
Services here

Should be signed by authorized  
person at CRDC or Tribal  
Government – not assisted  
entity or sub-recipient EDO

# Tribal Government Resolution

- Applications from Tribal Governments must include a Tribal Resolution with the application materials.



# Final Tips

- Double check your references and terminology throughout the application for consistency
  - Use of BSTF funds
  - Amount of funds requested
  - Matching funds
  - Job numbers

# Final Tips

- Application Deadlines – Quarterly 3/31, 6/30, 9/30 & 12/31
- Don't forget to send an electronic copy of the application
  - Via CD, email or through the file transfer service – [www.transfer.mt.gov](http://www.transfer.mt.gov)
- Send 2 hard copies – 3 hole punched
- No binders, spiral binding, etc.



# More information available on the web at:

[http://www.businessresources.mt.gov/BRD\\_Trustfund.asp](http://www.businessresources.mt.gov/BRD_Trustfund.asp)

On or after July 1, 2010:

[www.businessresources.mt.gov/bstf.mcp](http://www.businessresources.mt.gov/bstf.mcp)

*Please reference the Category II: Planning Grant application guidelines for further information on the eligible activities and requirements for funding under this program. Please contact program staff for additional guidance and funding availability before submitting a formal application.*

# Questions?

## BSTF Staff:

Quinn Ness, Section Manager (406) 841-2758

Angela Nelson, Program Manager (406) 841-2792

Alyssa Townsend-Hudders, Program Specialist  
(406) 841-2748

# Conclusion

This presentation, along with the audio and the quiz corresponding to today's webinar will be posted on the BSTF & CDBG-ED Program websites.

Successful completion of this quiz will count toward the Department of Commerce, Economic Development Certification.

Thank you for participating!

***CDBG-ED***

***Planning Grant Training***

***Community Development Block  
Grant (CDBG)***

***Economic Development (ED)***



## ***Eligibility***

General purpose local governments are eligible. This includes:

Counties, incorporated cities and towns, and consolidated city-county governments.

Local governments may sponsor an application on behalf of an entity that is otherwise not eligible. **This may include: non-profits; unincorporated areas; special districts, etc.**

## ***Eligible Activities***

**Plans** — Action, redevelopment, revitalization, renewal

**Studies or Assessments** — Preliminary architectural reports (PAR), feasibility studies, community needs assessments, environmental assessments , historic preservation

**Research** - related to economic development

## ***The Basics***

- \$25,000 maximum award per applicant
  - \$ for \$ match is required (“in-kind” not considered a match) – CDBG-ED funds will only pay for half of costs of a study*
- Open cycle
- First come, first served allocation
- Application must be typed and complete
  - ✓ Incomplete applications are returned

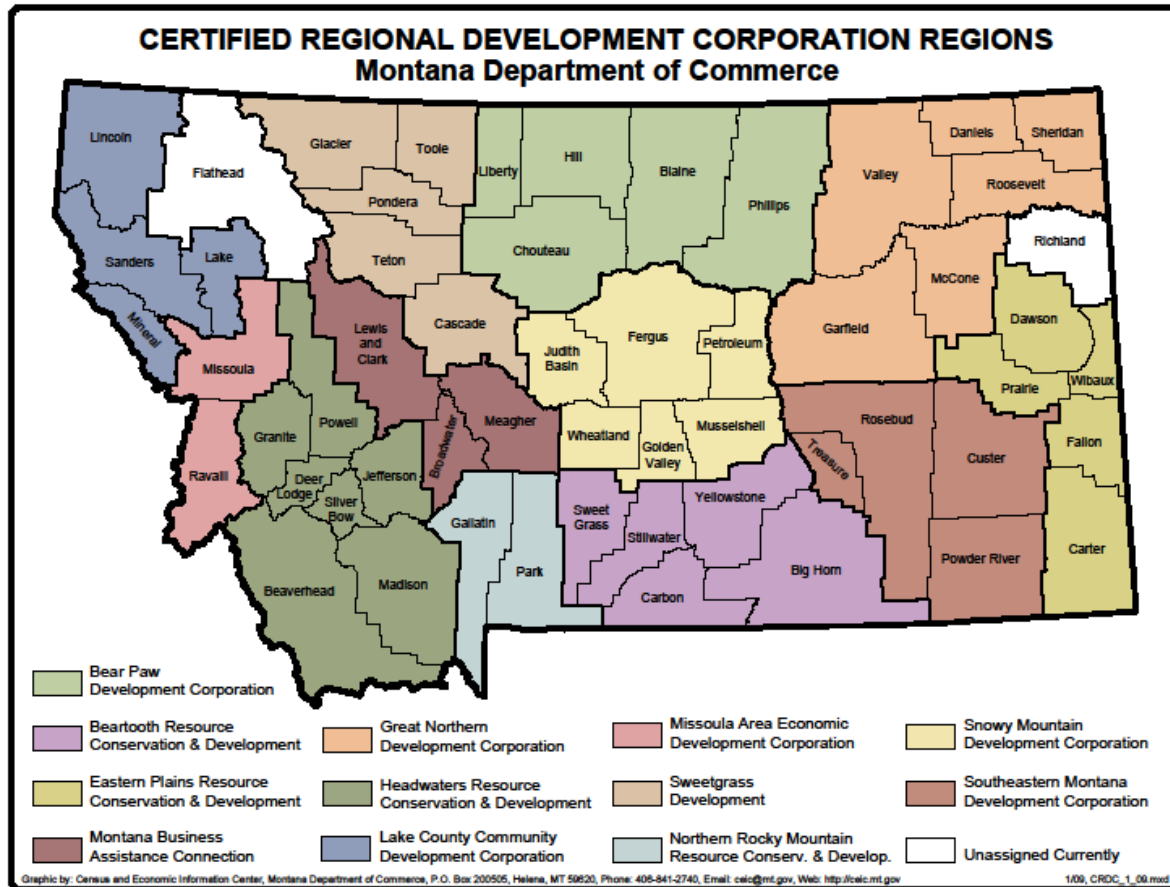
## ***Certified Regional Development Corporations***

Applicants must demonstrate a coordinated effort with the Certified Regional Development Corporation (CRDC) in their area.

on the web: [http://businessresources.mt.gov/BRD\\_CRDC.asp](http://businessresources.mt.gov/BRD_CRDC.asp)

The application must include a resolution passed by the local CRDC Board showing support for the proposed project. A letter of support from the CRDC may be accepted in lieu of a resolution.

## ***Certified Regional Development Corporations***



For areas not covered by an existing CRDC, when submitting an application, explain why you are not part of a CRDC.

This map can be found by navigating to the BRD website and clicking the CRDC link on the left side of the page. There is a link on the first CRDC page.

## ***Evaluation Criteria***

- Relationship to community planning
- Need for planning
- Community effort and financial need
- Benefit to low and moderate income citizens
- First time recipient

## ***Evaluation Criteria***

### **Relationship to community planning**

- Discuss the community's overall planning efforts.
- What tools have been used to determine development goals?
- How is the proposed planning project related to these effort and goals?

## ***Evaluation Criteria***

### **Need for planning activity**

- Discuss the need for the planning activity including issues that prioritize it over other potential activities.
- Discuss how many jobs will be created or retained if the proposed activity is related to business expansion or retention.



## ***Evaluation Criteria***

### **Community efforts and financial need**

- Discuss past efforts to address needs with local resources.
- Discuss the current efforts to secure financial assistance to potentially available resources.
- Explain the status of matching funds.

## ***Evaluation Criteria***

### **Community efforts and financial need**

- Explain why CDBG-ED planning grant funding is necessary.
  - ✓ Provide specific information regarding revenues and budgetary constraints.
  - ✓ Do not provide a general statement that the community does not have sufficient revenue to complete the planning effort.

## ***Evaluation Criteria***

Benefit to low and moderate income (LMI) persons

- Discuss the degree in which the proposed planning activity has the potential to benefit LMI persons in the long term (e.g. creation of jobs).

## ***timeout – what is LMI?***

The Department of Housing and Urban Development establishes the definition of low and moderate income persons and determines eligibility for CDBG assistance.

The criteria which defines low and moderate income is based on household size and yearly income. Further, it is defined geographically by county.

Current income limits by county are posted on the Business Resources Division, CDBG-ED web page.

FYI – for CDBG-ED projects (**not including planning grants**) current income limits must be used for income surveys.

## ***Evaluation Criteria***

### **First time recipient**

- The department will give priority to an application that is complete, has proposed a viable project, and has never applied for and/or received CDBG-ED funding in the past.

## ***Suggestions - procurement***

### **Procurement**

- Don't secure professional services until **AFTER** you've been awarded a planning grant.

Federal and state regulations may apply to the procurement and may dictate:

- RFP / RFQ bid requirements (advertisement, etc)
- Contractual language required
- Proof of free and open competition

The bottom line, you may be required to start the procurement process all over again, if you are not in compliance.

## ***Suggestions – completed projects / infrastructure***

Expenses for planning activity that has already occurred is not eligible.

–Don't complete a study, then apply for funds

Activities for housing, community public facilities improvements and preliminary engineering reports for water, waste water and solid waste are not eligible.

–Contact [TSEP](#) or [CDD](#) for more information

## ***Suggestions – administrative expenses***

Applicants may request up to 5% of their total CDBG-ED request to cover administrative expenses.

- Reimbursement for administrative expenses requires itemized documentation of **hours worked, the hourly rate, tasks completed** and **corresponding dates**.



## ***Suggestions – consultant billing***

Invoices from consultants, engineers, architects, etc. must also include:

- Itemized documentation of **hours worked, the hourly rate, tasks completed and corresponding dates.**

## ***Suggestions - consistency***

Make sure your references and terminology remain consistent throughout the application:

- Job numbers
- Matching funds and contributions
- Project activities
- etc.

It's confusing if terms, references and figures aren't in synch.

## ***Suggestions – implementation schedule***

Be realistic when completing your implementation schedule:

- The Department needs to review your RFP/RFQ prior to distribution/advertisement (so if you're projecting to have your consultant hired and we haven't approved the application, there may be a problem – see slide 15 ).
- It often takes longer to complete the plan or report than you originally estimate.

EXHIBIT II

CDBG-ED PLANNING GRANT  
 PROJECT IMPLEMENTATION SCHEDULE

TASK

MONTH, YEAR

PROJECT START UP

Preparation of MDOC Contract

PROCUREMENT OF  
 PROFESSIONAL ASSISTANCE <sup>1</sup>

Submit Request for Proposals (RFP) to  
 MDOC for approval, if required <sup>2</sup>

Publish RFP

Select professional

Execute agreement with professional

PROJECT IMPLEMENTATION

Prepare draft plan/report

Submit interim drawdown of funds

Public review and comment

Finalize plan/report

PROJECT CLOSEOUT

Submit final deliverable

Submit final drawdown

## Implementation Schedule

Remember, activities can be changed to match your project.

Be realistic in your time line

For instance, remember, we need to review the RFP or RFQ before it goes out.

It often takes longer to generate the reports than originally expected.

Don't build in expectations that can't be met. This can be counterproductive.

## ***Suggestions - budget***

Be concise when completing your budget:

- Reference all funding sources
- If multiple activities are going to transpire, list them as well as the funds being contributed to each activity and the funding source.

EXHIBIT I  
 CDBG-ED PLANNING GRANT  
 PROJECT BUDGET

Budget for CDBG-ED Planning Grants				Date:
	SOURCE: CDBG-ED	SOURCE: ← Match (Identify)	SOURCE:	TOTAL
Professional Services				
Other ←				
TOTAL PLANNING PROJECT	\$	\$	\$	\$

→ Note: The budget must be accompanied by a narrative that describes the CDBG-ED funds requested and local matching funds to be supplied by the applicant of local, state, federal, or private funds involved. The budget justification must thoroughly explain the rational or basis for all proposed budget costs, by line item.

## Budget

Reference all funding sources

If multiple activities are going to transpire, list them as well as the funds being contributed to each activity and the funds source.

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 CDBG-ED PLANNING GRANT  
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## Budget

Reference all funding sources

If multiple activities are going to transpire, list them as well as the funds being contributed to each activity and the funds source.

## ***Additional Forms – depository / signatory***

You will be required to provide both signatory and depository forms prior to drawing funds.

- Signatory Certification Form – Exhibit 1-D, CDBG Administrative Manual
- Designation of Depository Form – Exhibit 1-E, CDBG Administrative Manual



## Find out more on the web



The screenshot shows the Montana Department of Commerce website. The header includes the 'mt.gov' logo and a navigation bar with links to Commerce Home, Business, Community, Housing, Tourism, Finance, Census, Calendar, and Search. The main content area is titled 'Community Development Block Grant - Economic Development Program (CDBG-ED)' and features an 'Administrative Manual' section. A sidebar on the left lists various programs and boards, including the Census & Economic Information Center and the MT Board of Research & Commercialization. A right sidebar contains a 'CDBG Menu' with links to CDBG-ED Home, Eligible Activities, Eligible Applicants, Application Procedure, Application Assistance, Loan Policies, Revolving Loan Fund Manual, Application Guidelines, Administrative Manual, Planning Grant Guidelines & Application Form, WORD or PDF, CDBG-TSEP Master Project Consolidated List, HUD Income Limits, and Income Limit Memo. A blue arrow points to the 'Administrative Manual' link in the CDBG Menu. At the bottom, there is a 'Select Project Summary' section with a dropdown menu set to '2009' and a 'Go!' button.

**mt.gov**  
Montana's Official State Website

**DEPARTMENT OF COMMERCE**

Commerce Home | Business | Community | Housing | Tourism | Finance | Census | Calendar | Search

**Programs/Boards**

- Census & Economic Information Center
- MT Board of Research & Commercialization Technology
- State Tribal Economic Development Commission

**Regional Development Bureau**

- Big Sky Economic Development Trust Fund (BSTF)
- Business Expansion and Retention (BEAR)
- Business Finance
- Certified Regional Development Corporations Program

**Community Development Block Grant - Economic Development Program (CDBG-ED)**

**Administrative Manual**

**The Director of the Montana Department of Commerce has the discretion to allocate funds from either CDBG program to any CDBG eligible activity.**

To download all the files you must have WinZip or similar file compression software. Download a free WinZip evaluation version [here](#).

Some files have been updated (marked in Red). Note: The files available for download have **NOT** been updated. You will have to download the individual files to get the most current ones.

[ [Introduction](#) | [Table of Contents](#) ]

Chapters [ [1 thru 7 and 9 thru 14](#) ]

**CDBG Menu**

- [CDBG-ED Home](#)
- [Eligible Activities](#)
- [Eligible Applicants](#)
- [Application Procedure](#)
- [Application Assistance](#)
- [Loan Policies](#)
- [Revolving Loan Fund Manual](#)
- [Application Guidelines](#)
- [Administrative Manual](#)
- [Planning Grant Guidelines & Application Form](#)
- [WORD or PDF](#)
- [CDBG-TSEP Master Project Consolidated List](#)
- [HUD Income Limits](#)
- [Income Limit Memo](#)

**Select Project Summary**

2009

CDBG-ED  
website

## ***Find out more on the web***

The application guidelines for planning grants can be found on the web at:

<http://businessresources.mt.gov/Includes/CDBG/PlanGrant/CDBGEDPlanningGrantGuidelines.pdf>

We recommend reviewing the guidelines in their entirety prior to completing the application.

***Questions?***

## ***Conclusion***

This presentation, along with the audio from today's webinar will be posted on our website.

We will also post a link to a quiz based on this presentation. Successful completion of this quiz will count toward the Department of Commerce, Economic Development Certification.

Thank you for participating!

## ***CDBG-ED Staff***

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